# User Manual
# Appointment System

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## System Overview

The Appointment System enables the User to perform the following functions:

- ➢ New Patient Registration
- ➢ Retrieve User Name
- ➢ Retrieve Password
- ➢ Schedule Appointment
- ➢ Manage Appointment
- ➢ Cancel Appointment
- ➢ Profile Update
- ➢ Feedback

## Menu Options

- ➢ Schedule Appointment
- ➢ Manage Appointment
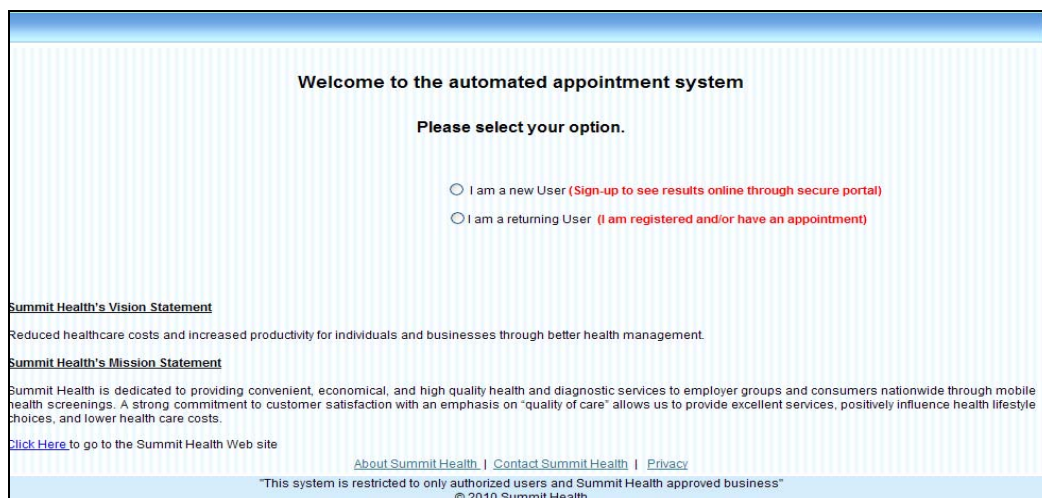- ➢ Profile Update
- ➢ Feedback

## Application Access

1. Open the browser and enter the URL:

***URL to Application***

2. Press **Enter** or click **Go**

3. The login page of the application appears as in Figure 1.1 Login Screen



**Welcome to the automated appointment system**

**Please select your option.**

○ I am a new User (Sign-up to see results online through secure portal)
○ I am a returning User (I am registered and/or have an appointment)

**Summit Health's Vision Statement**

Reduced healthcare costs and increased productivity for individuals and businesses through better health management.

**Summit Health's Mission Statement**

Summit Health is dedicated to providing convenient, economical, and high quality health and diagnostic services to employer groups and consumers nationwide through mobile health screenings. A strong commitment to customer satisfaction with an emphasis on "quality of care" allows us to provide excellent services, positively influence health lifestyle choices, and lower health care costs.

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Figure 1.1: Login Screen

4. Login

> ➢ Click on *I am a Returning User* Radio button
>
> ➢ Enter the User Name in the *User Name* textbox
>
> ➢ Enter the Password in the *Password* textbox
>
> ➢ Click *SIGN IN*

5. Logout

> ➢ Click the *Sign Out* link on the top right hand corner of the browser (when logged in)

6. Forgot Password

> ➢ Click on the *Forgot Password* link
>
> ➢ Screen as in Figure 1.2 *Forgot Password* appears
>
> ➢ Click on *YES* button if the user is registered with an *Email ID*
>
> ➢ Click on *NO* or *Don't Know* button if the user is not registered with an Email ID. Figure 1.4
>
> ➢ When the user hit on *YES* button, this will ask the user to enter the *User Name* and *Email ID*.
>
> ➢ Screen as in Figure 1.3 *Send Password* appears.
>
> ➢ Click *Send Password.*
>
> ➢ A message *Your Password has been sent to your Email ID.* is displayed to confirm that the password has been emailed to the user's email id
>
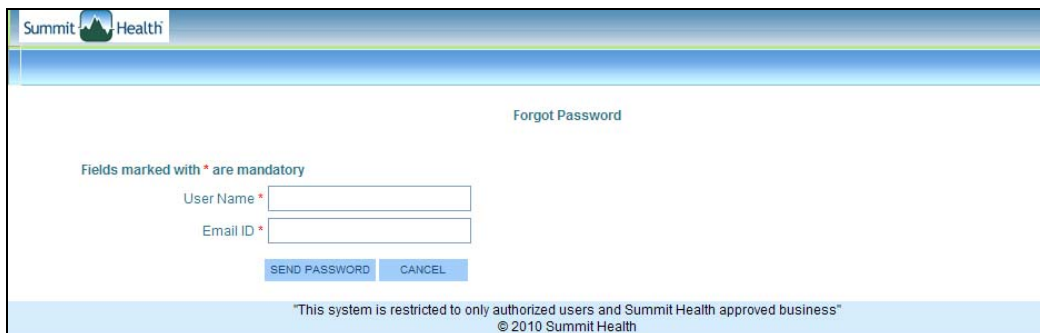> ➢ Click on *Cancel* to go back to login page and login with user name and password



Figure 1.2 Forgot Password



Figure 1.3 Send Password when user hit *YES* button on Figure 1.2

Figure 1.4 Send Password when user hit **NO** or **Don't Know** button on Figure 1.2

- ➢ When the user selects the No or Don't Know option in the Forgot Password screen, they will get the option to enter the First Name, Last Name, User Name, Security Question and Answer.

- ➢ Click on **Create Password** button. This will create a password and a mail will be sent to the user.

- ➢ Click on **Back** button to go back to the login page.

7. Forgot User Name

- ➢ Click on **Forgot Username** link

- ➢ Screen as in Figure 1.5 **Forgot UserName** appears



Figure 1.5 Forgot User Name

- ➢ Fill in the details like First Name, Last Name, Middle Initial, Email ID, Security Question and Answer. Fill in all the mandatory fields marked with asterisk(*)

- ➢ Click on **Send User Name** button. This will mail the User Name to the user in their mail ID.

## Patient Registration

1. Click *I am a new User* radio button on the login screen.

2. This will open the *Patient Registration - Contact Information* as shown in Figure 2.1



Figure 2.1 Patient Registration

3. Fill in the details in the fields marked with asterisk.

4. For the Email Address and Confirm Email Address, patient can't copy and paste the content either way.

5. If the user wishes to register for spouse, then he needs to click on *Do you want to register your spouse* check box as shown in Figure 2.2. Feature to get the option for registering for spouse is set in PM level.



Figure 2.2 Spouse Registration

6. Click on *Register* button to get registered. This will take the user to **Manage Credential Screen** where the user will give the Security Question and Answer as seen in Figure 2.3



Figure 2.3 Manage Credentials

7. Select the Security Question and answer and click on Update Security Question Information. This will take the user to Schedule Appointment Page.

## Schedule Appointment

1. After successful login the user will get the Schedule Appointment page as shown in Figure 3.1



Figure 3.1 Schedule Appointment

2. The values for Client Name and Program will be grey out and fixed.

3. Select the value for State from **State** dropdown menu.

4. The corresponding value for City and Site will be populated. Select the value of City from **City** dropdown and for Site from **Site** dropdown menu as shown in Figure 3.2

5. Here **Click to Manage Appointment** button will be disabled as there is no appointment in the name of this user to manage or reschedule.

10 . After selecting the **Site** the values for the **Clinics** available will be populated.



Figure 3.2 Lists of Clinics

8. The list of **Clinic** associated with that particular Site will be populated with the radio button as shown in Figure 3.2. This shows the list of clinics which are going to take place in the future. This does not show the expired clinics.

9. Select the value of Clinic by click on the radio button against the clinic.

10. Click on **Click To Schedule Appointment** button. This will open the Clinic Layout with the Appointments Available and color Legends to indicate **Available, Unavailable, Waitlist** and **Your Schedule Slot** as shown is Figure 3.3

Figure 3.3 Appointments Available

11. Click on the space with text as "*Click here to schedule a time slot*" on the time slot as desired to schedule the appointment.

12. This will lead to Appointment Confirmation page with the set of Questions which are set in the Program Management level as shown in Figure 3.4

Figure 3.4 Appointment Confirmation

13. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button.

14. This will confirm the appointment of the users on the desired slot and show the message as **"Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: 07/30/2010, Appointment Start Time: 10:00 AM, Appointment End Time : 10:30 AM"** as shown in Figure 3.5. Here the user will receive the mail from Admin regarding his/her appointment confirmation.



Figure 3.5 Appointment Confirmation and mail sent

15. When the user clicks on **Cancel Appointment** button, this will take the user back to the Schedule Appointment page.

16. When the user hit on **Print** button, this will print the screen of the appointment scheduled.

17. Click on **Exit** button, this will make the user to logout of the application.

## Manage Appointment

1. Select the *Manage Appointment* tab under *Appointment* menu as shown in Figure 4.1



Figure 4.1 Manage Appointment

2. Screen as in Figure 4.2 appears displaying the current appointment



Figure 4.2 On selecting Manage Appointment

3. Click on Reschedule button. This is show an alert message "**Do you want to Reschedule this appointment?**" as shown in Figure 4.3
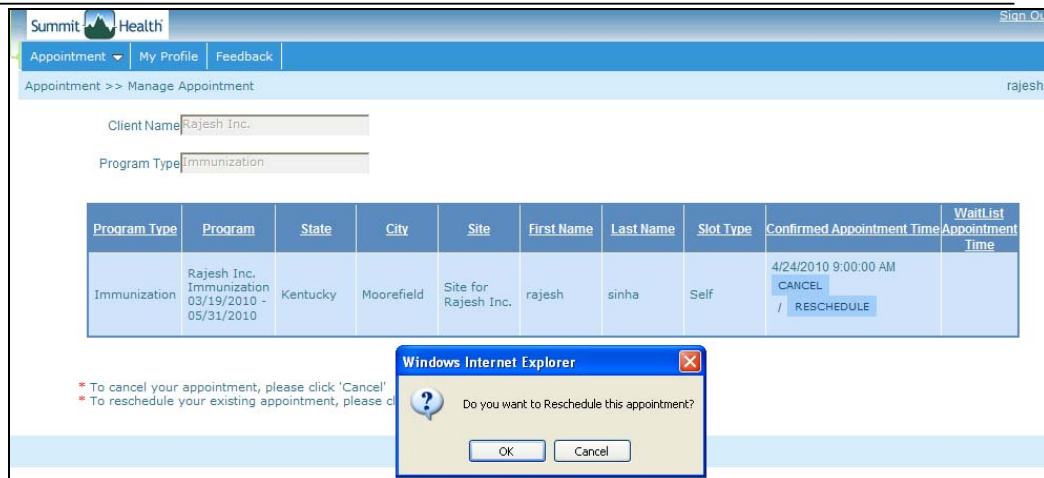
Figure 4.3 Alert Message

4. Click on **Cancel** button to remain on the same page.

5. Click on **OK** button, this will open the Reschedule Appointment page as shown in Figure 4.4. Here the user can **Reschedule** his/her appointment time for the same clinic based on the availability of the slots. The *green strip* shows user's already **Scheduled slot**. This also shows the number of appointments available out of total number of Appointment Available in a particular time slot.
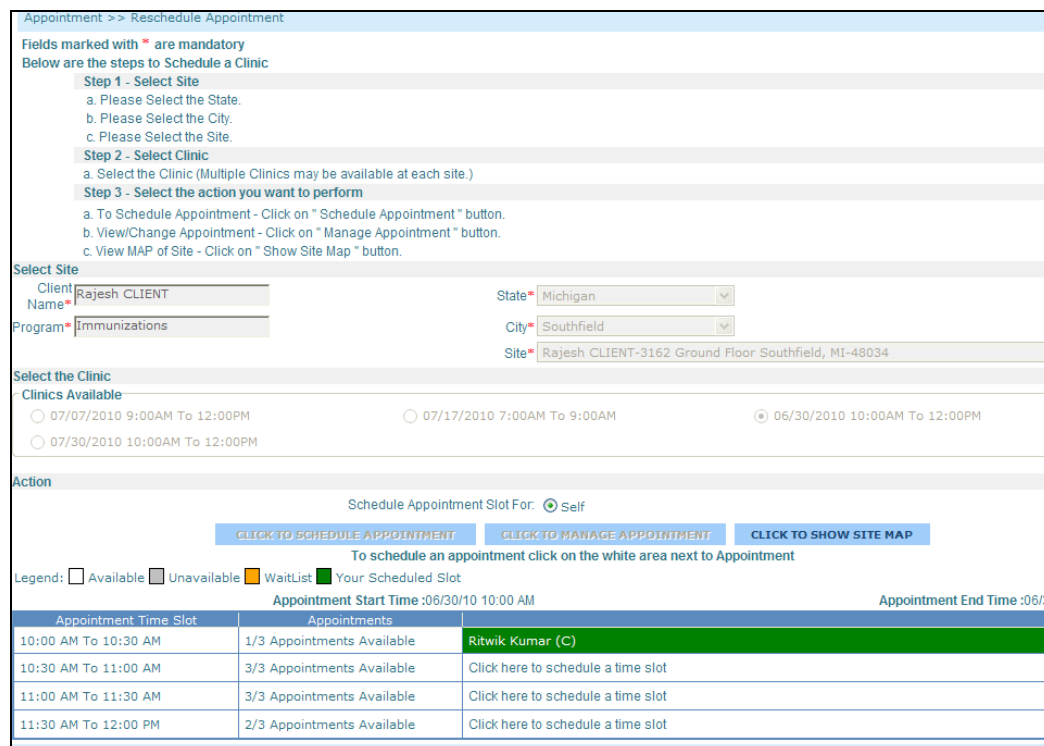


Figure 4.4 Reschedule Appointment

6. Click on the space with text as "*Click here to schedule a time slot*" on the time slot as desired to schedule the appointment This shows the **Appointment Confirmation** page as shown in Figure 4.5

Figure 4.5 Appointment Confirmation

7. Answer the various questions by selecting the radio buttons and checkboxes and click on **Confirm Appointment** button. This will show the message as **"Your appointment has been booked. A confirmation email has been sent to your email Address. Your Appointment Date: "Date", Appointment Start Time: "Time", Appointment End Time : "Time""**

8. Click on **Cancel Appointment** button. This will navigate back to **Reschedule Appointment** page.

9. Reselect the desired slot, this will again take to Appointment Confirmation page.

10. Select the various questions and click on **Confirm Appointment** button.

11. When the user hit on **Print** button, this will print the screen of the appointment scheduled.

12. Click on **Exit** button, this will make the user to logout of the application.

## Cancel Appointment

1. Select Manage Appointment from Appointment menu. This will show the Manage Appointment page as shown in Figure 5.1

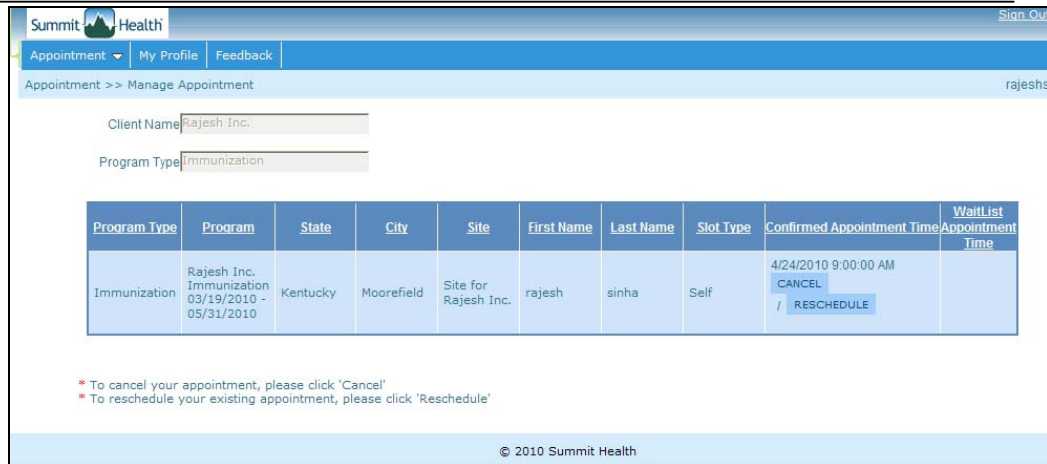Figure 5.1 On selecting Manage Appointment

2. Click on **Cancel** button. This will show the alert message as **"Do you want to cancel this appointment**' with *Ok* and *Cancel* button.

3. Click on **Cancel** button to keep the appointment as scheduled.

4. Click on **Ok** button.

5. This will cancel the appointment with the message as "**The Appointment is Successfully Canceled and email sent to the user.**" As shown in Figure 5.2
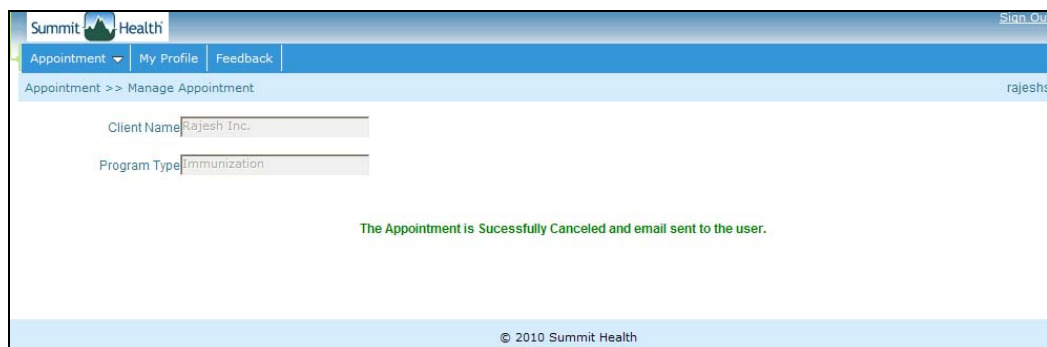


Figure 5.2 Appointment Canceled

## Profile Update

1. Click **My Profile** on menu

2. This will open the Profile Update page with **Employee Details** and **Employee Password Details** as headers as shown in Figure 6.1

Figure 6.1 Profile Update

4. Edit the details like First Name, Last Name, Date Of Birth, Email ID and Phone.

5. Click on **Update Employee Information** button.

6. This will give the message as "**Updated Successfully.**" and will update the user's profile.

7. If the user wishes to change his/her password, in the **Employee Password Details**, fill in the values for **Old Password** then **New Password** and **Confirm Password**. Verify that the values are valid and matching else the system will throw the alert message.

8. Click on **Change Password** button.

9. This will show the message as "**Updated Successfully**" and the Password of the user will get changed as shown in Figure 6.2

Figure 6.2 Change Password

## Feedback

1. Click on **Feedback** tab on the header.

2. This will open the Feedback page as shown in Figure 7.1



Figure 7.1 Feedback

3. Select the option for Clinic from *Clinic* dropdown menu.

4. Select either *Question* or *Feedback* from *Type* dropdown menu.

5. Fill in the comments in the "*Enter your feedback here*" section.

6. Check in the "*Please select here if you would like a reply*" if the user want the reply to the feedback.

7. Click on **Send Feedback** button.

8. This will send the feedback of the clinic to the Site Coordinator with the confirmation message as "**Your valuable feedback has been successfully sent.**" As shown in Figure 7.2



Figure 7.2 Feedback Sent